



Sibling Care Handoff

WORKSHEET

Use this worksheet to clarify responsibilities, organize important information, and create a plan so your family can provide consistent, confident care—together.



Share
responsibilities



Stay organized
and on track



Keep important
information
in one place



Communicate
clearly and
consistently



Reduce stress and
prevent gaps
in care



Support your
loved one—
together

THIS WORKBOOK BELONGS TO:

Care Recipient Name: _____

Date of Birth: _____

Primary Address: _____

City / State / Zip: _____

Today's Date: _____

Completed By: _____

Our Family Goal: _____



*Planning together today helps
your family tomorrow.*



Make caregiving easier for everyone.
CareNestHQ helps families stay organized,
connected, and prepared.

carenesthq.com





Our Family at a Glance

List the people involved in care and how to reach them. Keeping this information up to date helps everyone stay connected and informed.

1 Immediate Family & Care Team

Name	Relationship	Role / Responsibilities	Phone / Email	Best Way to Contact	Lives Nearby? (Y / N)



Roles may include:

Primary Caregiver • Medication Manager • Appointment Coordinator • Financial Manager
Document Keeper • Transportation Coordinator • Emergency Contact • Other

2 Extended Family & Support Network

Include extended family, close friends, neighbors, or professionals who may help.

Name	Relationship / Connection	How They Can Help	Phone / Email	Best Way to Contact

3 Communication Agreements

A few agreements now can prevent confusion later.

-  How will we share updates? _____
-  How often will we check in? _____
-  How will urgent issues be communicated? _____
-  Who makes decisions in different situations? _____
-  Other important agreements: _____



*Clear communication today
creates peace of mind tomorrow.*



TIP

Review this page during your weekly check-in to keep everyone aligned.





Care Responsibilities Assignment

Clear roles prevent confusion and ensure nothing falls through the cracks.

Use this worksheet to assign who is responsible for each area of care.



Work Together

Share responsibilities based on each person's strengths, location, and availability.

Responsibility Area	Primary Owner (Name)	Backup Owner (Name)	How Often (Daily / Weekly / Monthly / As Needed)	Notes / Special Instructions
 Primary Caregiver Overall care coordination and daily oversight				
 Medication Manager Medication list, refills, pharmacy, and updates				
 Appointment Coordinator Scheduling, reminders, transportation, and follow-up				
 Financial Coordinator Bills, budgeting, insurance, and financial planning				
 Transportation Coordinator Rides to appointments, errands, and activities				
 Family Communicator Shares updates, answers questions, and keeps everyone informed				
 Document Manager Important documents, forms, and records				
 Emergency Contact First point of contact in an emergency				
 Backup / Relief Steps in when primary caregivers are unavailable				



Tips for Success

- ✓ No responsibility should have only one person.
- ✓ Review roles together every 3–6 months.
- ✓ It's okay to adjust as needs and availability change.
- ✓ Communicate openly and ask for help.



Important Note

Everyone's time and circumstances change. Check in regularly to make sure these assignments still work for your family.



Shared responsibilities create stronger families and better outcomes for your loved one.





Weekly Family Check-In

A 15-minute weekly check-in keeps everyone aligned, catches issues early, and helps your loved one receive the best possible care.



Estimated Time:
15 Minutes

Set a regular time and make it a weekly habit.



Health Review

2 min

How are they feeling overall?

- ☐ How are they feeling this week?
- ☐ Any new symptoms or changes?
- ☐ Any falls or near-falls?
- ☐ Any concerns we should know?

Notes:



Medications

2 min

Are medications managed and up to date?

- ☐ Any new prescriptions?
- ☐ Refills needed?
- ☐ Any side effects?
- ☐ Any missed doses?

Notes:



Appointments

3 min

What's coming up?

- ☐ Upcoming appointments?
- ☐ Transportation arranged?
- ☐ Follow-up items from last visits?
- ☐ Questions for providers?

Notes:



Care Tasks

2 min

What needs to be done?

- ☐ Tasks completed?
- ☐ Any overdue tasks?
- ☐ New tasks this week?
- ☐ Who will take what?

Notes:



Important Documents

2 min

Are important documents in order?

- ☐ HIPAA authorization current?
- ☐ Insurance information updated?
- ☐ Advance directives on file?
- ☐ Emergency info accessible?

Notes:



Family Communication

2 min

Is everyone informed and in the loop?

- ☐ Everyone up to date?
- ☐ Any new caregivers involved?
- ☐ Scheduling conflicts?
- ☐ Questions or concerns?

Notes:



Next Week Plan

2 min

What are our priorities for next week?

- ☐ Who owns what?
- ☐ Upcoming appointments?
- ☐ Shopping or errands?
- ☐ Medication pick-ups?
- ☐ Follow-up calls?

Notes:



Helpful Tip

Keep this check-in positive, organized, and solution-focused. It only takes 15 minutes, but the benefits last all week.



Consistency creates confidence and better care.



Prefer a Printable Version?

Download the Weekly Family Check-In Worksheet to use during your family meeting.



Scan the QR code or visit carenesthq.com/worksheets to download now.





Medication & Appointment Handoff

Use this page when responsibilities shift or when someone is stepping in to help.
 Keep this information up to date and easy for the next person to follow.



Why it matters

Accurate medication and appointment information helps prevent errors and missed appointments.

1 Current Medications

	Medication Name (Include Dose)	Purpose / Condition	Prescribing Doctor	Pharmacy	Refill Date	Special Instructions / Notes
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						



TIP: Bring an updated medication list to every doctor appointment and hospital visit.

2 Upcoming Appointments

	Date	Time	Provider / Location	Type of Visit	Who's Going?	Notes / Follow-Up
1						
2						
3						
4						
5						
6						
7						
8						



Appointment Prep Checklist

- ☐ Review reason for visit
- ☐ List questions for the provider
- ☐ Bring updated medication list
- ☐ Bring insurance cards
- ☐ Bring list of allergies
- ☐ Arrange transportation
- ☐ Confirm date, time, and location
- ☐ Note follow-up needed

3 Important Follow-Up Items

Track what needs to be done after appointments or hospital visits.

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4 Questions for Providers

Write down questions to ask at upcoming appointments.

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*Good handoffs lead to better care.
 Clear today. Confident tomorrow.*



Keep this page updated
 and share it with anyone
 involved in care.

More tools and resources
 for your family at
[carenesthq.com](https://www.carenesthq.com)





Important Documents & Emergency Information

Keep these essential documents accessible and up to date.
 Knowing where to find information can save valuable time in an emergency.



Quick Tip

Store copies in a secure location and share with trusted family members. Review every 6 months.

1 Important Documents Checklist

	I Have This (Y / N)	Where Is It Stored? (Location / Folder / Account)	Who Has Access? (Name)
 HIPAA Authorization Allows family members to speak with healthcare providers.	☐	_____	_____
 Emergency Medical Information Card Medications, conditions, allergies, physicians, and emergency contacts.	☐	_____	_____
 Medication List Current medications, doses, and prescribing doctors.	☐	_____	_____
 Insurance Cards Health, dental, vision, and prescription coverage.	☐	_____	_____
 Advance Directive / Living Will Healthcare wishes and treatment preferences.	☐	_____	_____
 Healthcare Power of Attorney Who can make healthcare decisions if needed.	☐	_____	_____
 POLST / DNR Physician Orders for Life-Sustaining Treatment (if applicable).	☐	_____	_____
 Financial & Legal Documents Will, trust, accounts, powers of attorney, and key contacts.	☐	_____	_____
 Physician Directory Primary care, specialists, and other important providers.	☐	_____	_____
 Other Important Documents List any other documents your family should know about.	☐	_____	_____



Keep digital copies in a secure app like CareNestHQ.
 Never store passwords with important documents.

3 Important Information at a Glance



Date of Birth

____ / ____ / ____



Home Address



Preferred Phone

(____) _____



Primary Language

Allergies: _____

Medical Conditions: _____



2 Emergency Contacts

Primary Care Physician

Name: _____

Phone: _____

Office Location: _____



Specialist (If Applicable)

Name: _____

Phone: _____

Office Location: _____



Local Hospital

Name: _____

Phone: _____

Address: _____



Pharmacy

Name: _____

Phone: _____

Address: _____



Emergency Contact

Name: _____

Relationship: _____

Phone: _____



Secondary Emergency Contact

Name: _____

Relationship: _____

Phone: _____



Helpful Reminders

- ✓ Review documents every 6 months.
- ✓ Update after any changes in medications, doctors, or insurance.
- ✓ Share updates with the whole family care team.
- ✓ Store copies both digitally and in a secure physical location.



Preparation today brings peace of mind for the whole family.



Organize, store, and share important documents all in one secure place.
 CareNestHQ makes it easy.
carenesthq.com





Family Care Action Plan

Use this page during your weekly check-in to plan, assign, and track what needs to be done. Small steps lead to better care and less stress.



Work as a Team

Clear plans and shared responsibilities help everyone contribute and nothing gets missed.

1 Top Priorities This Week

What are the most important things we need to focus on?

1

2

3

2 Tasks & Action Items

List tasks, assign to someone, and set a target date.

Task / Action Item	Assigned To	Target Date	Status
			☐
			☐
			☐
			☐
			☐
			☐
			☐

3 Upcoming Appointments

Who, what, when, and where?

Date	Time	Provider / Location	Purpose / Notes

4 Who Owns What?

A quick view of key responsibilities this week.

Responsibility	Primary Owner	Backup Owner
Medications		
Appointments		
Transportation		
Finances		
Documents		
Communication		
Care Updates		
Other		

5 Questions for Providers

Write down questions to ask at upcoming appointments.

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6 Family Notes & Updates

Important updates, observations, or things we want to remember.

7 Next Check-In

Schedule our next weekly check-in.



Date:



Time:



Location / How:



Reminder Set By:



*Plan together.
Care better. Live better.*



A little time together each week
creates a big difference.



Need help staying organized?
CareNestHQ makes it easy.
[carenesthq.com](https://www.carenesthq.com)



Continue Organizing Your Family's Care with CareNestHQ

You've taken an important step by creating a plan together. CareNestHQ helps your whole family stay organized, informed, and connected—every day.



You're Not Alone

Care is a team effort. CareNestHQ makes it easier for everyone to contribute and stay in the loop.

Everything You Need in One Secure Place



Shared Tasks

Create, assign, and track tasks so nothing falls through the cracks.



Appointments

Keep all appointments, reminders, and follow-ups in one place.



Important Documents

Store and share essential documents securely and access them anytime.



Medications

Maintain an up-to-date medication list with refills, dosages, and notes.



Care Updates

Share updates, ask questions, and keep the whole family informed.



Emergency Information

Have critical information ready when it matters most.



Stronger Families. Better Care.

When everyone has the right information, at the right time, your loved one receives better care—and your family experiences less stress.

- ✓ Improve communication
- ✓ Reduce confusion
- ✓ Share responsibilities
- ✓ Give peace of mind



Start Your Free Account Today

Bring your family together and keep your loved one's care organized in one secure place.



Secure & Private

Your data is protected with industry-leading security.



Family Focused

Designed for families working together from anywhere.



Easy to Use

Simple tools that make organizing care effortless.

Scan to Start Free



carenesthq.com



Thank you for taking action for your loved one.

A little planning today leads to better care, stronger families, and peace of mind for everyone.



Questions? We're here to help.

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carenesthq.com